

# Introduction to InfoPath 2010

Myriad Technologies Training  
1 Day—Level 200



## Course Outline

This one day course has been designed to provide an introduction to InfoPath 2010. This course has been developed to provide a balance of theory, class room discussion and hands on lab time. This enables the students to discuss new concepts and then put them into practical applications during the labs.

## Skills Gained

After completing this course the attendees will:

- Understand the various solutions provided by InfoPath
- Understanding of the design principles for creating forms
- Understand the benefits InfoPath and Form Services
- Have gained practical experience with creating electronic forms
- Working knowledge of creating validation rules
- Introduction to performing calculations within your forms
- Understanding of the benefits of deploying forms to SharePoint

## Target Audience

This course has been designed for SharePoint Power Users who have already attended the Site Members and Site Owners courses. If you are ready to take your SharePoint skills to the next level then this course is for you. This course will enable you to create and deploy rich electronic forms that can help you automate your business processes.

## Prerequisites

This course has been developed to build upon the concepts presented in the Site Members and Site Owners courses. Students attending this course should have already completed the **Site Members** and **Site Owners** course. These prerequisite courses provide the base knowledge of SharePoint and Security which are critical before you attempt this course to empower you to build electronic forms with InfoPath.

## Course Overview

### Working with Forms

In this module we will explore the basic functionality of InfoPath forms that have been deployed to SharePoint. During the demonstrations we will provide you with working examples of how to extract meaningful Business Intelligence from your InfoPath forms and how this process can be simplified. We will also discuss in-depth the various advantages of using InfoPath Filler Client over InfoPath Forms Services.

### Designing your Form

There are a number of methods to designing your InfoPath form. In this module we will explore some of these methods and discuss the 'best practices' and some of the common 'gotchas' that are faced when designing your forms.

### Layouts and Controls

The presentation and layout of your InfoPath forms is commonly overlooked during the form development lifecycle. In this module we will walk you through the simple methods that InfoPath provides to make your form visually appealing.

### Rules and Calculations

An integral part of creating rich interactive forms is understanding what validation rules you have at your disposal to ensure your forms contain valid information before they are submitted. You can also utilise various calculations on your form data to help streamline the processing of your forms.

### Creating Views

During the creation of sophisticated forms you can choose to employ multiple views to help present the right information to the right person at the right time. Views also provide a method of locking data down so it can no longer be modified. During this module we will explore various techniques that can use Views to create highly interactive forms.

### Publishing your Form

Once you are happy with your form you can choose to publish the form to SharePoint. In this module we will walk you through the process of publishing your form to your SharePoint environment so you can take full advantage of all the features that SharePoint provides.

### Adding Workflow

The final piece of the puzzle is to use SharePoint Workflow to process the form. In this module we will be utilising Visio 2010 to create the workflow process diagram and then leveraging SharePoint Designer 2010 to deploy the workflow to SharePoint. This module will provide you with an introduction to what is possible with the new workflow features available in SharePoint 2010.